



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 7/31/2000

GAIN Report #NL0029

The Netherlands

Tobacco and Products

Annual

2000

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Report Highlights:

- The Dutch cigarette industry is the largest in Europe, but production and consumption are not increasing.**
 - The U.S. remains the most important supplier of flue-cured and dark fire-cured tobacco to Dutch tobacco products producers.**
-

Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

The Hague [NL1], NL

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Executive Summary

After decreases in 1995 and 1996 and a 7.9 percent increase in 1997, domestic sales and production have stabilized since 1998.

Total Dutch imports of raw tobacco were 84,860 metric tons in 1999, slightly more than the preceding year. The U.S. market share as a percentage of total imports increased from 29.3 percent in 1998 to 32.3 percent in 1999. Almost 98 percent of Dutch cigarette production is exported to the European Union, mostly to France and Italy.

In 1999, the United States remained the largest single supplier of flue-cured tobacco to the Netherlands with a 35.5 percent share of the market, up from 33.2 percent in 1998. Zimbabwe and Brazil follow, with Zimbabwe's market share at 21.6 percent and Brazil's at 14.1 percent.

Exchange Rate			
Year	U.S. \$	EURO	Dutch florin (guilder)
1998	1	-	1.98
1999	1	0.94	2.07
2000	1	1.05*	2.29*

Note: For 2000 exchange rates are only available for the first six months

NOTE: due to the elimination of EU intra-border controls, intra-EU trade statistics are no longer gathered through customs declarations. The Dutch Central Bureau of Statistics (CBS) now depends on direct reports from importers and exporters on intra-EU movement of goods. Companies with a relative small trade volume have been exempted from this trade reporting requirement. However the response of importers and exporters has been such, that intra-EU trade statistics are not complete. Therefore, figures used are mainly based upon available trade statistics, speculations and assumptions made by the trade and Office of AgAffairs estimates.

Production - Cigarettes

C *Production is growing*

Total Dutch cigarette production increased from 116,263 million pieces in 1998 to 119,983 million in 1999. The two largest cigarette manufacturers in the Netherlands are Rothmans Manufacturing (Holland) B.V. and Philip Morris Holland B.V.

The names of the five major Dutch cigarette manufacturers follow:

B.A.T. Nederland b.v.

Deccaweg 26
1042 AD Amsterdam
Tel. 31-20-587.12.22
Fax. 31-20-611.77.23

R.J Reynolds Tobacco b.v.

Vreelandseweg 46
1216 CH Hilversum
Tel. 31-35-622.28.88

Philip Morris

Marconilaan 20
4622 RD Bergen op Zoom
Tel. 31-164-295.000

Rothmans Nederland b.v.

de Boelelaan 32
1083 HJ Amsterdam
Tel. 31-20-541.68.11
Fax. 31-20-646.29.15

Reemtsma Nederland b.v.

Comeniuslaan 10
1412 GP Naarden
Tel. 31-35-694.97.66

Because the Dutch tobacco industry is marked by an extensive production of cigars and cut tobacco (roll-your-own, pipe- and chewing tobacco), a brief overview is given for the production of these products.

- Cigars

A substantial part of the Dutch cigar production takes place by affiliates located just across the Belgium border, in Ireland and even in Sri Lanka. In most cases, semi-manufactured cigars are made in the "foreign" affiliates, subsequently "exported" to the Netherlands and finished in this country. The Dutch Central Bureau of Statistics considers both cigars that have been entirely produced in the Netherlands and those semiprocessed at a foreign affiliate as domestic production.

The Netherlands: Cigar Production (million pieces)				
	1995	1996	1997	1998
cigars, senioritas, cigarillos	1,759	1,776	1,889	2,015

Source: NVS, & Central Bureau for Statistics (no 2000 figures available yet)

With a total production of more than two million cigars, senioritas and cigarillos each year, Holland is the second largest cigar manufacturer in the world after the U.S. Dutch cigars and cigarillos are exported to more than 100 countries. The leading export destinations are France, Belgium and Luxembourg (BLEU), the United Kingdom and, Germany.

- Smoking and Cut Tobacco

Production of the cut tobacco industry (roll-your-own, pipe- and chewing tobacco) decreased 1 percent in 1999 to 28.7 million kilos. In the Netherlands, Imperial Tobacco Nederland/Van Nelle Tabaksmaatschappij B.V., Koninklijke Theodurus Niemeyer B.V., Tabaksfabriek Heupink & Reinders B.V., Biggelaar Tabak b.v. and Tabakskerverij J.B.G. Bloemen B.V. account for the total production of the different cut tobacco products.

The names of the four producers of roll-your-own and pipe tobacco in the Netherlands follow.

Tabakskerverij J.B.G. Bloemen B.V.

De Mors 120
7631 AK Ootmarsum
Tel. 31-541-291218

Tabaksfabriek Heupink & Reinders b.v.

De Mors 84
7631 AK Ootmarsum
Tel. 31-541-291285

Imperial Tobacco Nederland/Van Nelle Tabak Nederland

Tabaksmaatschappij B.V.
Van Nelleweg 1
Tel. 31-10-4464444

Koninklijke Theodurus Niemeyer b.v.

Theodurus Niemeyerstraat 1
9726 BB Groningen
Tel. 31-50-3664911

The Netherlands is by far the largest producer of roll-your-own tobacco in Europe although it is also produced in other European countries such as the U.K., Germany, Norway, Denmark and France.

The Dutch shag tobacco industry is working very hard to develop export markets as they believe it is the only possibility to expand production. Germany and Belgium are important customers of the Dutch roll-your-own tobacco industry, whereas the French market is slowly developing an interest as well. The competitiveness and strength of the Dutch roll-your-own tobacco industry have a direct bearing on the importation of U.S. dark fire cured tobacco which is an indispensable ingredient for this product.

Macro-Economic Importance of the Tobacco Industry in the Netherlands

The tobacco industry contributes to the Dutch economy in terms of employment, tax yield and trade. According to research completed in 1999, 4,500 people are employed in the Dutch tobacco industry. Indirectly, 20,000 work in distribution, wholesale, retail and advertising. The tobacco industry in the 15 member states of the EU employed an equivalent of 1 percent of total employment in the EU. Tobacco companies have a remarkably long “lifetime”, averaging 156 years. The regular lifetime of a company in the Netherlands is 12.5 years. The Dutch Government receives yearly more than two billion Euros from taxes and excise taxes.

Given that more than half of the official selling price of cigarettes in the EU consists of excise duties, tobacco fraud is a growing problem. The illegal importation of cigarettes results in large income losses for the government and huge profits for smugglers. The European Anti-Fraud Office (OLAF) estimates that “black” cigarettes account for up to 10 percent (3.6 billion Euros) of the EU market. Because of the enormous increase in smuggling over the last couple of years, the European Commission is investigating the possibility to recover the loss from U.S. tobacco manufactures. A civil procedure against some U.S. tobacco manufactures has already been started.

Consumption - Cigarettes

National Consumption

C *Minimal decline in cigarette sales*

Cigarette sales dropped slightly by 0.5 percent in 1999 compared to last year. In pieces, sales decreased from 16,623 billion in 1998, to 16,543 in 1999. On a value basis, however, there was an increase of 4 percent over the preceding year. It is expected that over the long term Dutch consumption of cigarettes will show a constant decrease due to a number of factors such as price increases through taxation, growing health consciousness, and limitations on advertisements. Nevertheless, recent research has shown that people start smoking at a younger age in the Netherlands. Children at the age of ten smoking cigarettes are not an exception anymore. About 5 percent of the children in the age category 11-12 years frequently smoke, like 25 percent of the 13-years old and approximately 50 percent of the elder teenagers. It is known that the younger people start with smoking, the harder it is to overcome this addiction. It is also clear that parents who smoke have a significant negative effect on the smoking habits of their children. Although in the Netherlands 100,000 people stop smoking each year, 90,000 others take their first cigarette. More than 85% of the starters are under the age of 18. Approximately 50 percent of the people who start smoking in the age category 12-18 years will die of smoking-related diseases.

The Dutch Cigarette Manufacturers Association publishes the following figures on smoking habits of the Dutch people in the age category 18-65 years. This category consists of about 12 million men and women. In 1999, approximately 4.4 million persons (36.4 percent of the adult population) smoked 20 cigarettes a day on average.

Smoking Demographics				
	1996	1997	1998	1999
Non-smoker	63.0%	63.4%	62.9%	63.6%
Smokers	37.0%	36.6%	37.1%	36.4%
<u>Smokers smoke:</u>				
- Cigarettes	36.8%	34.7%	36.3%	38.4%
- Roll-your-own	23.2%	23.9%	23.9%	22.6%
- Cigarettes and r-y-o	31.4%	32.8%	31.2%	28.6%
- Other	8.6%	8.6%	9.6%	10.4%
Smoking Men:	53.2%	53.5%	53.4%	52.5%
Smoking Women:	46.8%	46.5%	46.6%	47.5%

Source: Association of the Cigarette Industry

The Most Popular Cigarette Brands by Sales:				
	1996	1997	1998	1999
1. Marlboro	20.4%	21.4%	21.9%	22.7%
2. Marlboro lights	6.7%	7.7%	8.5%	9.9%
3. Camel filter	9.0%	8.3%	8.4%	7.8%
4. Caballero filter	5.4%	5.5%	5.7%	5.8%
5. Barclay	6.1%	5.9%	6.0%	5.8%
6. Peter Stuyvesant	5.9%	5.6%	5.3%	5.0%
7. Caballero plain	5.1%	4.6%	4.2%	3.8%
8. Pall Mall export filter	3.6%	3.4%	3.3%	3.2%
9. Marlboro medium	-	-	-	2.2%
10. Camel medium	-	-	2.2%	2.1%

Source: Association of the Cigarette Industry

Trade - Cigarettes

C *Increased Exports of Cigarettes*

After a slight decrease in 1998, the exports of cigarettes increased in 1999. The Netherlands exported 117.9 billion pieces in 1999 (compared to 110.5 billion in 1998). This represents an increase of approximately 6.7 percent. In value there was an increase due to higher prices. The position of the Netherlands as the largest exporter of cigarettes in Europe was maintained. Of the total production, more than 98 percent (a decrease of 1 percent), was exported to countries of the European Union, of which Italy and France are the most important countries for the export of cigarettes.

Year	Total Exports (million pieces)	Percentage of Domestic Production
1994	84,952	90.8
1995	92,914	88.4
1996	103,473	92.0
1997	115,215	90.0
1998	110,527	99.0
1999	117,884	98.0

Source: Stichting Sigaretten Industrie

Note: these figures are different from the figures from CBS, which are used in the PS&D tables

Factors Affecting U.S. Trade

U.S. tobacco remains the preferred tobacco for Dutch tobacco product manufacturers, especially if it is price competitive. The U.S. flue-cured tobacco is needed for flavor. The dark fire-cured tobacco from Kentucky is considered almost indispensable for making the roll-your-own or shag tobacco which is very popular in the Netherlands. This is particularly true in times when the economy is in a recession.

The U.S. market share as a percentage of total imports increased from 29.3 percent in 1998 to 32.3 percent in 1999. An increase in cigarette production in the Netherlands will likely result in increased imports of U.S. flue-cured tobacco. However, for burley tobacco, imports from the United States will be driven by the "just in time" buying policy of the cigarette manufacturers. The companies will continue to allow the leaf dealers to hold the tobacco in their U.S. inventories until it is absolutely necessary.

Imports & Exports of Total Unmanufactured Tobacco (Metric Tons/Values in 1,000 Guilders)						
	1997		1998		1999	
Imports	VOLUME	VALUE	VOLUME	VALUE	VOLUME	VALUE
Flue Cured	47,879	482,057	44,174	479,565	49,669	536,354
Burley	15,560	168,643	16,998	200,118	18,758	238,469
Dark Air	3,121	30,391	2,533	25,099	2,831	38,484
Oriental	18,567	160,589	13,496	141,426	13,603	143,185
Grand Total	85,127	841,680	77,201	846,208	84,861	956,492

Exports	VOLUME	VALUE	VOLUME	VALUE	VOLUME	VALUE
Flue Cured	5,326	47,478	6,345	99,770	8,652	138,808
Burley	1,571	10,984	745	6,312	1,253	9,758
Dark Air	2,685	28,600	1,512	14,418	1,759	16,233
Oriental	1,224	11,929	1,231	14,837	832	10,555
Grand Total	10,806	98,991	9,833	135,337	12,496	175,354

Source: Central Bureau for Statistics

There is a large discrepancy between EU import duties for raw tobacco and finished products. During the period July 1-December 31, 2000, certain types of tobacco (flue cured Virginia type, light air-cured Burley type, light air-cured Maryland type and fire-cured Kentucky type) imported on a non-preferential basis are subject to an ad valorem duty of 18.4 percent. Other types of raw tobacco, imported on a non-preferential basis, are subject to a duty of 11.2 percent. Cigarettes are charged an ad valorem duty of 57.6 percent, making non-preferential imports expensive. In order to protect its internal tobacco processing industry, the EU is not likely to change this tariff discrimination. Export refunds are currently not used for raw tobacco or tobacco products exported from the EU.

Prices - Cigarettes

The price of one pack of 25 cigarettes is as follows:

Prices of Cigarettes (25)		
As of:	Dutch Guilder	US\$1.00 = DFL
Jul 1, 1992	5.10	1.76
Jan 1, 1993	5.50	1.86
Oct 1, 1994	5.65	1.70
Oct 1, 1995	5.75	1.60
April 1, 1997	6.15	1.90
April 1, 1998	6.45	2.07
Jan 1, 1999	6.70	1.88
March 1, 2000	6.95	2.28

The EU excise tax on cigarettes was "harmonized" in 1993 at a minimum of 57 percent of the retail price. The Netherlands implemented the EU excise tax directive in that same year. However, as different EU countries have different retail prices, excise taxes are in reality far from harmonized. This is especially the case in northern EU countries which have higher cigarette prices than the southern "monopoly" countries. For instance, cigarette prices in Denmark are five times as high as those in Spain. The southern European countries do not want to increase their prices as they are afraid of competition of the more popular cigarettes (mostly American blends) from the northern EU countries. As there is now one open EU market, the northern countries fear the influx of the less expensive southern EU cigarettes in their markets.

Prices of Cigarettes as of March 1, 2000 (Prices for 25 Piece Pack)		
	Guilders	Percent
Retail price	6.95	100.0
of which:		
Excise tax	3.96	57.0
Value-added Tax	1.04	15.9
Cost and margins	1.95	28.1

Distribution - Cigarettes

Type of outlet - Cigarettes	1998	1999
Tobacco specialty shops	20.1%	21.0%
Supermarkets	30.5%	31.4%
Petrol stations	14.0%	14.0%
Restaurants & café's	21.0%	20.4%
Other	14.4%	13.2%

Quality, Safety and Health Regulations

In the Netherlands anti-smoking regulations require health warnings to cover 15 percent of billboards and posters while warnings in print media must cover 10 percent. No advertising on billboards is allowed, except on the two Dutch racetracks. Television advertising is also not allowed. Advertisements cannot link smoking with sports; youth or health care. People younger than 25 are not allowed to appear in ads. No advertising is permitted in the neighborhood of health care centers and schools. Cigarette advertising in cinemas has not been allowed since January 1996. Free sampling of cigarettes is banned. Restrictions on smoking in specific public places are currently in effect. Health warnings, along with tar and nicotine levels, are required on cigarette packages.

A smoking ban exists for government-subsidized cultural institutes. In addition to the smoking ban, more stringent regulations are also planned for cigarette advertising. These plans have sparked angry reactions from the tobacco industry which claims that more and more restrictions are being imposed every year.

In June 2000 political agreement has been reached in the European Council and the European Parliament on a proposal for a EU directive to harmonize the manufacture, presentation, and sales of tobacco products. The proposal is based on a report which the EU Commissioner for Health presented in 1996, discussing final and regulatory channels for combating tobacco-related health risks. As 500,000 EU citizens die each year of smoking-related diseases (including 24,089 Dutch people) the EU has begun to focus on the protection of public health through the prevention of smoking. The political agreement opens the door for an early adoption of the following elements:

- , a reduction in maximum tar levels of cigarettes from 12 mg to 10 mg per cigarette beginning December 31, 2003, or three years from the date of adoption;
- , the creation of a maximum nicotine yield level of cigarettes marketed or manufactured in the EU of 1 mg per cigarette beginning December 31, 2003;
- , the creation of a maximum carbon monoxide yield of not more than 10 mg per cigarette beginning December 31, 2003;
- , the obligation for all manufacturers and importers of tobacco products to submit a list of non-tobacco ingredients, including additives, used in the manufacture of their tobacco products by brand;
- , bigger and clearer warnings ("Smoking kills") covering 25 percent of the package on tobacco packets. The attention of consumers will be drawn to the links between smoking and certain deceases, and the particular danger of tobacco use by pregnant women;
- , the prohibition of the use of terms such as "low tar," "light," "mild." These terms have in the past led to

misapprehensions on the part of consumers, in that they were erroneously assuming that these terms referred to products less harmful to human health.

Claims against the Dutch Tobacco Industry

Since spring 2000 the Dutch tobacco industry has faced its first claims from hundreds of smokers who suffer from smoking-related diseases due to their addiction. The Dutch Smokers Fund, who represents these smokers, holds the Dutch tobacco industry and the government responsible for the bad health of its clients. According to the Smokers Fund, the tobacco industry and the government did not warn people against the risks of smoking, even they have known the risks since the fifties. The juridical procedure could last 10-15 years, but it is expected that millions of U.S. dollars could be paid in claims.

Market Development Opportunities

Because of the EU's 1993 legislation for maximum levels of tar/nicotine (to be effective in 1998), there may be a minor shift to lighter tobaccos. Appropriate machinery and specific filters have been designed to adapt to new legislation related to tar/nicotine requirements.

Statistical Tables (PSD & Trade Matrices)

- Tobacco, Unmfg.

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Total				(HA) (MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	0	0	0	0	0	0
Beginning Stocks	36,827	36,827	43,327	28,364	38,827	18,337
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	25,000	23,819	24,000	27,401	0	30,963
Other Foreign Imports	83,000	60,994	70,000	57,459	0	54,011
TOTAL Imports	108,000	84,813	94,000	84,860	0	84,974
TOTAL SUPPLY	144,827	121,640	137,327	113,224	38,827	103,311
Exports	9,500	10,276	95,000	12,497	0	14,746
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	24,000	23,000	24,000	25,990	0	29,109
Other Foreign Consump.	68,000	60,000	65,000	56,400	0	53,016
TOTAL Dom. Consumption	92,000	83,000	89,000	82,390	0	82,125
TOTAL Disappearance	101,500	93,276	98,500	94,887	0	96,871
Ending Stocks	43,327	28,364	38,827	18,337	0	6,440
TOTAL DISTRIBUTION	144,827	121,640	137,327	113,224	0	103,311

Note: In 1999 Total Distribution is lower due to the reduction of commodities from the Gain Reporting Review

Import Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Total		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.	22,655	U.S.	27,401
Others		Others	
E.U.	13,232	E.U.	13,483
-Belgium	854	-Belgium	158
-Italy	1,027	-Germany	6,457
-Greece	4,261	-Greece	2,717
Zimbabwe	7,735	Zimbabwe	10,735
Brazil	13,050	Brazil	8,832
Turkey	6,343	Turkey	8,106
Malawi	2,885	Malawi	2,917
India	2,766	India	2,231
Total for Others	46,011		46,304
Others not Listed	8,534		11,155
Grand Total	77,200		84,860

Export Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Total		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.	8	U.S.	
Others		Others	
E.U.	9,536	E.U.	12,394
-Belgium/Lux	4,717	-Belgium/Lux	5,407
-Ireland	1,172	-Ireland	1,182
-Greece	3,152	-Greece	3,714
Total for Others	9,536		12,394
Others not Listed	289		103
Grand Total	9,833		12,497

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Flue Cured				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	0	0	0	0	0	0
Beginning Stocks	2,346	2,346	2,000	239	750	255
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	12,000	11,729	11,500	17,630	0	20,627
Other Foreign Imports	38,000	21,164	21,000	32,039	0	34,602
TOTAL Imports	50,000	32,893	32,500	49,669	0	55,229
TOTAL SUPPLY	52,346	35,239	34,500	49,908	750	55,484
Exports	5,000	3,000	2,750	8,653	0	10,989
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	9,346	9,000	9,000	12,000	0	13,500
Other Foreign Consump.	36,000	23,000	22,000	29,000	0	30,750
TOTAL Dom. Consumption	45,346	32,000	31,000	41,000	0	44,250
TOTAL Disappearance	50,346	35,000	33,750	49,653	0	55,239
Ending Stocks	2,000	239	750	255	0	245
TOTAL DISTRIBUTION	52,346	35,239	34,500	49,908	0	55,484

Import Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Flue Cured		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.	14,670	U.S.	17,630
Others		Others	
E.U.	3,920	E.U.	5,332
-Germany	1,089	-Germany	3,096
Zimbabwe	7,735	Zimbabwe	10,735
Brazil	9,601	Brazil	7,009
Malawi	1,734	Malawi	1,799
India	2,590	India	1,780
Tanzania	1,759	Tanzania	2,764
Total for Others	27,339		29,419
Others not Listed	2,164		2,620
Grand Total	44,173		49,669

Export Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Flue Cured		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	6,342	E.U.	8,652
-Belgium/Lux	1,864	-Belgium/Lux	2,538
-Ireland	1,172	-Ireland	1,182
-Italy	148	-Italy	844
-Greece	3,152	-Greece	3,714
-Portugal	-	-Portugal	364
Total for Others	6,342		8,652
Others not Listed	3		1
Grand Total	6,345		8,653

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Burley				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	0	0	0	0	0	0
Beginning Stocks	4,418	4,418	2,384	4,000	2,834	3,542
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	8,000	7,949	8,000	9,758	0	11,612
Other Foreign Imports	7,500	9,049	9,500	9,000	0	8,910
TOTAL Imports	15,500	16,998	17,500	18,758	0	20,522
TOTAL SUPPLY	19,918	21,416	19,884	22,758	2,834	24,064
Exports	1,750	745	800	1,253	0	1,767
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	6,000	6,250	6,250	7,438	0	8,628
Other Foreign Consump.	9,784	10,421	10,000	10,525	0	10,630
TOTAL Dom. Consumption	15,784	16,671	16,250	17,963	0	19,258
TOTAL Disappearance	17,534	17,416	17,050	19,216	0	21,025
Ending Stocks	2,384	4,000	2,834	3,542	0	3,039
TOTAL DISTRIBUTION	19,918	21,416	19,884	22,758	0	24,064

Import Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Burley		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.	7,949	U.S.	9,758
Others		Others	
E.U.	2,940	E.U.	3,797
-Belgium/Lux	63	-Belgium/Lux	105
-Germany	1,605	-Germany	2,410
-Italy	1,027	-Italy	715
Brazil	2,543	Brazil	1,429
Malawi	1,151	Malawi	1,118
Uganda	429	Uganda	1,325
Argentina	511	Argentina	729
Total for Others	7,574		8,398
Others not Listed	1,475		602
Grand Total	16,998		18,758

Export Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Burley		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	685	E.U.	1,204
-Belgium	606	-Belgium	642
-Portugal	25	-Germany	557
Hungary	44	Hungary	15
Total for Others	729		1,219
Others not Listed	16		34
Grand Total	745		1,253

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Oriental				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	0	0	0	0	0	0
Beginning Stocks	9,986	10,219	12,586	7,484	11,336	5,105
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	0	0	0	0	0	0
Other Foreign Imports	19,000	13,496	14,000	13,603	0	13,739
TOTAL Imports	19,000	13,496	14,000	13,603	0	13,739
TOTAL SUPPLY	28,986	23,715	26,586	21,087	11,336	18,844
Exports	1,400	1,231	1,250	832	0	566
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	15,000	15,000	14,000	15,150	0	15,302
TOTAL Dom. Consumption	15,000	15,000	14,000	15,150	0	15,302
TOTAL Disappearance	16,400	16,231	15,250	15,982	0	15,868
Ending Stocks	12,586	7,484	11,336	5,105	0	2,976
TOTAL DISTRIBUTION	28,986	23,715	26,586	21,087	0	18,844

Import Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Oriental		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	5,952	E.U.	4,066
-France	-	-France	267
-Germany	1,092	-Germany	951
-Greece	4,261	-Greece	2,717
Turkey	6,343	Turkey	8,106
Bulgaria	248	Bulgaria	657
Total for Others	12,543		12,829
Others not Listed	953		774
Grand Total	13,496		13,603

Export Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Unmfg., Oriental		
Time period	CY	Units:	
Exports for:	1998		1999
U.S.	8	U.S.	
Others		Others	
E.U.	1,045	E.U.	816
-Belgium	811	-Belgium	539
-Italy	205	-Italy	173
Czech Rep.	142	Czech Rep.	-
Russia	-	Russia	10
Hungary	10	Hungary	5
Total for Others	1,197		831
Others not Listed	26		1
Grand Total	1,231		832

PSD Table						
Country	Netherlands					
Commodity	Unmfg., Dark Air & Sun Cured				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	0	0	0	0	0	0
Beginning Stocks	4,432	4,432	4,154	4,433	3,824	4,389
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	10	36	40	13	0	4
Other Foreign Imports	2,500	2,497	2,500	2,818	0	3,171
TOTAL Imports	2,510	2,533	2,540	2,831	0	3,175
TOTAL SUPPLY	6,942	6,965	6,694	7,264	3,824	7,564
Exports	1,900	1,512	1,600	1,759	0	2,005
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	20	20	6	0	2
Other Foreign Consump.	888	1,000	1,250	1,110	0	1,221
TOTAL Dom. Consumption	888	1,020	1,270	1,116	0	1,223
TOTAL Disappearance	2,788	2,532	2,870	2,875	0	3,228
Ending Stocks	4,154	4,433	3,824	4,389	0	4,336
TOTAL DISTRIBUTION	6,942	6,965	6,694	7,264	0	7,564

Import Trade Matrix			
Country	Netherlands		
Commodity	Unmfg., Dark Air & Sun Cured		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.	36	U.S.	13
Others		Others	
E.U.	420	E.U.	288
-France	55	-France	74
-Belgium	205	-Belgium	53
Brazil	906	Brazil	394
Indonesia	187	Indonesia	330
India	176	India	451
Sri-Lanka	334	Sri-Lanka	359
		Dom. Rep.	452
Total for Others	2,023		2,274
Others not Listed	474		544
Grand Total	2,533		2,831

Export Trade Matrix			
Country	Netherlands		
Commodity	Unmfg., Dark Air & Sun Cured		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
E.U.	1,464	E.U.	1,722
-Belgium	1,436	-Belgium	1,688
Switzerland	12	Switzerland	17
Dom. Rep	25	Dom. Rep	8
Total for Others	1,501		1,747
Others not Listed	11		12
Grand Total	1,512		1,759

PSD Table						
Country	Netherlands					
Commodity	Tobacco, Mfg., Cigarettes				(MIL PCS)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Filter Production	100,000	99,850	100,000	103,185	0	106,281
Non-Filter Production	16,000	16,413	16,250	16,798	0	17,301
TOTAL Production	116,000	116,263	116,250	119,983	0	123,582
Imports	19,000	17,583	18,000	15,833	0	14,250
TOTAL SUPPLY	135,000	133,846	134,250	135,816	0	137,832
Exports	118,500	103,722	105,000	105,113	0	106,164
Domestic Consumption	16,500	30,124	29,250	30,703	0	31,668
TOTAL DISTRIBUTION	135,000	133,846	134,250	135,816	0	137,832

*) The PS&D consumption figure is the residual of production plus imports minus exports. However, the Dutch Cigarette Manufacturers Association uses tax seal figures to compute "true" consumption figures and makes adjustments for the so-called anticipation purchases and border sales. Anticipation purchases occur when a price increase is announced. Border sales are purchases of cigarettes in the Netherlands by visiting Germans or Belgians who come to the Netherlands to buy Dutch cigarettes, which are less expensive than those sold in their own country.

Import Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	CY	Units:	Million Pieces
Imports for:	1998		1999
U.S.	2	U.S.	1
Others		Others	
E.U.	17,573	E.U.	15,823
-France	448	-France	310
-Belgium	5,601	-Belgium	4,330
-Germany	4,155	-Germany	3,982
-U.K.	6,977	-U.K.	6,145
Japan	1	South Africa	5
Total for Others	17,574		15,828
Others not Listed	7		4
Grand Total	17,583		15,833

Export Trade Matrix			
Country	Netherlands		
Commodity	Tobacco, Mfg., Cigarettes		
Time period	CY	Units:	Million Pieces
Exports for:	1998		1999
U.S.	37	U.S.	49
Others		Others	
E.U.	100,194	E.U.	101,320
-France	35,318	-France	37,512
-Belgium/Lux	8,577	-Belgium/Lux	7,820
-Germany	9,593	-Germany	10,264
-Italy	32,022	-Italy	33,496
-Greece	5,005	-Greece	4,400
Switzerland	414	Switzerland	391
Slovenia	330	Libya	352
Japan	1,164	Japan	1,030
Total for Others	102,102		103,093
Others not Listed	1,583		1,971
Grand Total	103,722		105,113